



THE VETERINARY VENDOR EVALUATION WORKBOOK

**Your guide to smarter vendor
decisions across every area of your
practice.**

HOW TO USE THIS WORKBOOK



PREP (BEFORE THE CALL)

- > Send vendors your top two workflows (e.g., “Schedule wellness exam → consent → invoice → SMS receipt”) and ask them to show those exact tasks, not a canned slide deck.
- > Share your deal-breakers (e.g., “No IDEXX integration? We can’t consider it.”) so nobody wastes time.
- > Request a sandbox login if possible, or at minimum, a screen-share controlled by your staff for 5 minutes.

15-MINUTE STRUCTURE

- > 2 min — Intros + purpose (“We’re evaluating veterinary software to cut admin time by 20% in 90 days.”)
- > 5 min — Your 2 workflows end-to-end
- > 5 min — Ask the 5 questions (included in this book, additional questions if you want to send offline or have additional time)
- > 3 min — Next steps + deliverables (sample contract, total cost of ownership breakdown)

HOW TO USE THIS WORKBOOK



USING THE SCORECARD

- **Step 1:** Circle the number of the question you are asking that vendor (1-5).
- **Step 2:** Circle the score you would give based on the five qualities of transparency, alignment, support, ownership, and value.
- **Step 3:** Make any additional notes about the vendor or red flags you noticed.

Question #

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TECHNOLOGY PLATFORM

Evaluate software transparency, integration, data ownership, implementation plan, and support.



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GPO

Assess pricing models, vendor selection, transparency, fees, and services to maximize savings.



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ADVERTISING

Choose agencies specializing in veterinary marketing that connect ads to measurable growth.



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WEBSITE / DIGITAL PRESENCE

Prioritize function, ownership, and service scope to build a high-performing, secure veterinary website.



Page 41-48

LENDER

Align with lenders offering financing, expert networks, and strategies for practice growth.



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LEARNING & DEVELOPMENT

Seek role-specific education programs that build skills, engagement, and long-term retention.



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INSURANCE

Partner with brokers who align benefits with recruitment, retention, and compliance.



Page 61-66

COMPLIANCE

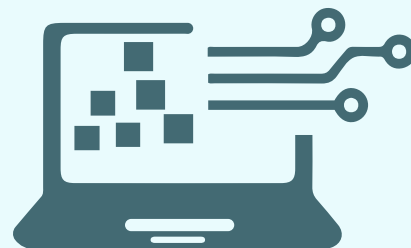
Work with compliance experts for veterinary-specific regulations and safety standards.

HOW TO PROPERLY INTERVIEW ANY TECHNOLOGY VENDOR

ARTICLE SUPPORTED BY: [VETSOFTWAREHUB.COM](https://vetsoftwarehub.com)

INTRO

Veterinary teams don't buy software every day, but vendors sell it every day. That asymmetry shows up in glossy demos, vague answers, and calendar invites that multiply faster than kittens. If you've ever left a call thinking, "That looked nice... but will it actually work in our hospital?" This guide is for you.



TYPES OF VENDORS:

- CHCKVET
- ALLYDVM
- VETSPIRE
- SHEPHERD



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Questions to Interview A Technology Vendor

01

What's our total cost of ownership (TCO) in Year 1 and Year 3, including implementation, training, migration, SMS/e-fax overages, payment processing, and any required add-ons?



WHY IT MATTERS

Sticker price $\neq$ real price. TCO clarifies whether "cheap" software becomes expensive as you scale.



GOOD ANSWER

A written table with line items and assumptions (DVMs, locations, texts per month, payment fees). Bonus points for price-increase caps at renewal.



RED FLAGS

"It depends" with no numbers.
"Professional services billed as needed."



VERIFY

Request the TCO as an attachment with math you can change. Plug the figures into your scorecard to compare options apples-to-apples.



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Questions to Interview A Technology Vendor

02

Who owns our data, and what does export look like during the contract and at the end, including format, timeline, and cost cap?



WHY IT MATTERS

If you can't leave, you don't really own your data. True "best veterinary software" never locks you in.



GOOD ANSWER

"You own your data. Exports available anytime as CSV/JSON with patients, clients, notes, invoices, imaging indexes. End-of-term export: \$X flat within 5 business days."



RED FLAGS

"We can provide PDFs."
"We'll quote the export after you submit a ticket."



VERIFY

Ask for the export field list and a sample file. Add a data-ownership clause to the order form if it's not there.



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Questions to Interview A Technology Vendor

03

Which integrations are native and which require third-party bridges? Is the data bi-directional? Any rate limits or extra fees?



WHY IT MATTERS

Integrations drive efficiency for labs, imaging, pharmacy, reminders, payments, analytics. A half-baked sync creates rework.



GOOD ANSWER

A vendor map with native connectors (e.g., IDEXX, reference labs, payment gateways), what's read vs. write, known limits, and pricing for premium connectors.



RED FLAGS

"We integrate with everything" (without specifics).
"Coming soon" without dates.



VERIFY

Ask to see the integration settings screen and a live result (e.g., lab result posting to SOAP). Put timelines into the contract if "coming soon" is critical. If the integration is necessary for one of your main workflows, it may not be the software for you.



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Questions to Interview A Technology Vendor

04

What's the implementation plan: roles on both sides, data-migration scope, cutover approach (moving from one system to another), downtime expectations, training hours, and go-live success criteria?



WHY IT MATTERS

A clear path prevents painful go-lives. The best veterinary software vendors treat implementation as a shared project.



GOOD ANSWER

A written plan with named owners, migration mapping, sandbox testing, dry run, scheduled cutover with time estimates, number of live training sessions, and success metrics (e.g., 90% of staff logged in and completed top tasks)



RED FLAGS

"We'll figure it out later."
All training is "watch videos."



VERIFY

Ask for the implementation checklist and a sample project timeline from a similar clinic size and species mix.



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Questions to Interview A Technology Vendor

05

How does support work? What are the channels, hours, response/resolve SLAs, escalation path, and is there a named customer-success manager?



WHY IT MATTERS

Support determines time-to-value and long-term satisfaction. Great software + poor support = churn.



GOOD ANSWER

Multi-channel (chat/email/phone), responses in minutes for P1 issues (priority 1 / critical issues), published SLAs with credits, clear escalation, named CSM for clinics above a certain size.



RED FLAGS

"Email us and we'll get back to you."
No weekend coverage.



VERIFY

Open a test ticket or ask to see their support portal. Request support hours in writing.



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Questions to Interview A Technology Vendor

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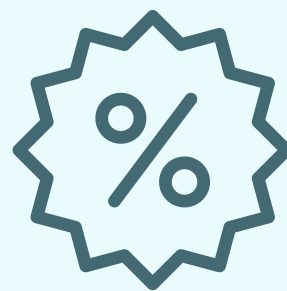
5 QUESTIONS TO ASK A VETERINARY GPO BEFORE SIGNING ON

ARTICLE SUPPORTED BY: [VETCELERATOR](#)

INTRO

With so many veterinary GPOs (Group Purchasing Organizations) on the market today, it can be tough to know where to start. Should you go with a GPO that focuses only on vet supply discounts? Do you need a GPO that bundles marketing and support services? The result of having so many Group Purchasing Organizations is that the first or best salesperson wins.

However, imagine you are going to a conference and you want to learn more, or you start conducting a search online. What criteria should you use to determine the best GPO fit for your practice?



TYPES OF VENDORS:

- TVC
- VERTICAL VET
- PSI
- VETCELERATOR



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Questions to Ask a Veterinary GPO

1 - WHAT IS THE VETERINARY GPO'S PRICING MODEL?

Veterinary GPOs typically offer one of two pricing models: guaranteed vet supply discounts or volume-based rebates. When comparing your options, ask:

Do you offer fixed discounts or tiered pricing/rebates based on how much I buy?

What are your most common vendor partners, and how are prices negotiated?

Can I see examples of average annual savings for clinics of my size?

Some GPOs use a hybrid model that includes predictable discounts on supplies along with discounts in-house on website, recruiting, and social media marketing support services, making the pricing structure even more valuable in the long run.



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Questions to Ask a Veterinary GPO

2 - HOW DOES YOUR GROUP PURCHASING ORGANIZATION SELECT VENDORS?

Not every GPO offers discounts across the same product lines nor has access to discounts across the same vendors. Be sure to ask:

What vendors are a part of your purchasing group?

How do I access discounts and rebates from these vendors?

What selection criteria do you use when curating your procurement platform?

How do you incorporate risk management into your selection process?

What you want to understand is how the GPO selects their partners and how they determine that these vendors are truly best-in-class for the GPO's member veterinary clinics.



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Questions to Ask a Veterinary GPO

3 - WHAT REPORTING SHOULD I EXPECT?

Transparency helps your practice track real value over time. Key questions include:

Do you offer regular reports that show what we're saving and where?

Are administrative fees, commissions, or vendor rebates disclosed? How?

It's important to understand the Return on Investment of your membership. Asking questions regarding reporting, fee structure, and your options for saving outside the membership will give you an idea of what you should use the GPO for and what you may need to supplement. You will want to choose a veterinary GPO that will be upfront about costs and how they operate.



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Questions to Ask a Veterinary GPO

4 - WHAT IS THE COST OF JOINING THE VETERINARY GPO?

Not all GPOs are free to join. Some charge annual fees or require a minimum purchase volume in order to get vet supply discounts. Oftentimes, this is not straightforward. Be sure to ask:

What are the total annual costs: membership, onboarding, or vendor access fees?

Does being a member of your GPO preclude me from being a member of other GPOs?

Where do I find a billing statement?

As mentioned above, the pricing model for a GPO may be a combination of payments from members and payments from vendor partners. Understanding how the GPO makes money is valuable for aligning your values with your selected GPO partner.



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Questions to Ask a Veterinary GPO

5 - WHAT SERVICES ARE INCLUDED IN THE GROUP PURCHASING ORGANIZATION?

The best veterinary GPOs go beyond supply savings. They act as operational partners. Ask:

What other services are included in your GPO Membership?

What services do you offer for a fee inside of the GPO?

How do I interact with your group? Is there a dedicated support person, a chatbot, or an email service?

What are expectations of communication?

The service model is a consideration. Some GPOs are light-touch, which may be appropriate for your needs, while others are very hands-on in your growth.

Determining where you want to be and where your GPO partner fits is an important consideration.



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Questions to Ask a Veterinary GPO

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Questions to Ask a Veterinary GPO

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Questions to Ask a Veterinary GPO

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5 QUESTIONS TO ASK BEFORE HIRING A DIGITAL ADVERTISING MANAGER

ARTICLE SUPPORTED BY: [VETCELERATOR](#)

INTRO

Veterinary digital advertising can drive consistent, measurable growth for your clinic, but only when it's executed with data, local intent, and full transparency. Hiring a digital ads manager should directly support the growth objectives of your clinic. Campaigns are only effective when they're built around outcomes that matter to your business. These five questions help you evaluate whether your partner is positioned to deliver results.



TYPES OF VENDORS:

- PETVISOR
- PETDESK
- EOS
- VETCELERATOR



ARTICLE SUPPORTED BY: [VETCELERATOR](#)

5

Questions to Ask an Ads Manager

Q

1 – How Is Ad Performance Tracked for Veterinary Clinics?

A

You need more than impressions and clicks. Your ads partner should offer real-time performance tracking and reporting that connects advertising spend to actual outcomes like appointments, calls, and conversions.

A good dashboard should show, by campaign and aggregated:

- **Cost Per Click (CPC)**
- **Click-Through Rate (CTR)**
- **Conversion Rate**
- **Cost Per Conversion**

You'll always know what's working and where to optimize.



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Questions to Ask an Ads Manager

Q

2 – What Pet Owner Targeting Methods Will Be Used?

A

A capable digital ads partner uses:

- **Geo-targeting and first-party data**
- **Behavioral and search patterns**
- **Local keyword signals**

Hyper-local advertising drives real growth when your ads connect with pet owners in your zip code who are most likely to engage or book care. Including additional data points and resources, like linking data from your PIMS into the ad process, strengthens the ability of an ads manager to leverage data to find your next client.



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5

Questions to Ask an Ads Manager

Q

3 – Does the Agency Specialize in Veterinary Marketing?

A

Veterinary clinics have distinct marketing needs. From seasonal demand shifts to industry vernacular and client trust, effective advertising requires a deep understanding of the field.

A good veterinary marketing agency has a deep understanding of veterinary and pet practices and includes experts on their team. Whether you're promoting dental care, increasing wellness visits, or trying to find staff, industry specification matters.



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5

Questions to Ask an Ads Manager

Q

4 – Which Ad Networks and Formats Are Best for Vet Clinics?

A

Each advertising platform serves a specific function based on your clinic's goals.

- **Google Search Ads capture pet owners with immediate intent**
- **Meta Ads (Facebook and Instagram) build visibility, trust, and long-term engagement**

A well-rounded advertising approach typically includes both: **Google for immediate conversions and Meta for sustained engagement.** Match the ad type to your clinic's current priorities, e.g., filling same-week appointments or staying top-of-mind in your neighborhood. This approach will get the best results.



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5

Questions to Ask an Ads Manager

Q

5 – How Does This Marketing Partner Support Long Term Growth?

A

Veterinary advertising should contribute to your broader business goals. Ask how the agency connects campaigns to real outcomes like booked appointments, increased visits per client, or reduced no-shows.

A strong partner will show how marketing efforts integrate with your clinic's operations, client communication, and scheduling flow, so growth is not just visible in reports, but felt in your day-to-day practice.



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Questions to Ask an Ads Manager

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Questions to Ask an Ads Manager

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ARTICLE SUPPORTED BY: [VETCELERATOR](#)

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Questions to Ask an Ads Manager

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5 QUESTIONS TO ASK BEFORE HIRING A WEBSITE DESIGNER / MANAGER

ARTICLE SUPPORTED BY: [VETCELERATOR](#)

INTRO

Choosing a website designer for your veterinary clinic isn't just about aesthetics. It's a strategic decision that affects your visibility, reputation, and growth. Before you commit to a partner, ask these five essential questions to clarify expectations, avoid common pitfalls, and set your digital presence up for success.



TYPES OF VENDORS:

- PETVISOR
- LIFELEARN
- EOS
- VETCELERATOR



ARTICLE SUPPORTED BY: [VETCELERATOR](#)

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Questions to Ask a Website Designer



1 - Does the Designer Have a Portfolio of Veterinary Websites?

This may seem like a no-brainer, but it's one of the most important questions you can ask. Even without any formal education in website design and digital presence trends, everyone generally knows what a good website looks like and what a bad one looks like. But because 'good' and 'bad' are still subjective terms, you need to make sure that you and the designer you're interviewing are on the same page.

When it comes to design, there's more to consider than just, "Do you like the way it looks?" Functionality is just as important, if not more so. Your website needs to be user-friendly, meaning it is:

- **Easy to navigate**
- **Intuitive to find information and links on**
- **Responsive on screens of all sizes (especially mobile)**

Every veterinary website designer should say 'yes' to having a portfolio and give you some examples of their work.



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Questions to Ask a Website Designer



2. What Is the Scope of Website Services?

Not all website providers offer the same level of service. Ask exactly what's included in the quoted price, **design, hosting, security, SEO, and post-launch support** may all be priced separately. If you need more than a visual build, such as uptime monitoring, backups, or regular content edits, make sure those are clearly outlined.

Clarify how updates are handled after launch, whether content changes are included or billed hourly.

Ask how the site will perform in search. The agency should explain their strategy, from **keywords to metadata** and even Generative Engine Optimization (GEO), which improves visibility on AI platforms.

Confirm hosting and security expectations:

- **Will your site be monitored for malware?**
- **Backed up regularly?**
- **Is email hosting included?**

Understanding the full scope will help you avoid surprise fees or the need to juggle multiple vendors later.



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Questions to Ask a Website Designer



3. How Do You Measure the Success of A Veterinary Clinic's Website?

A website is a marketing tool, so it's important to think about your website in terms of criteria for successful marketing.

A good answer here may be something in terms of up-time, security, and organic ranking with customer satisfaction in terms of performance and design. A good answer should be nuanced because performance and ranking, in terms of SEO / digital presence relative to competitors, depends on the competitive landscape and what the user is searching for - which is always evolving.

A red flag would be to suggest the goal is to rank #1 as an organic ranking is dependent on what is being searched, e.g. a search for your exact clinic name by someone in your area should return your clinic #1.



ARTICLE SUPPORTED BY: [VETCELERATOR](#)

5

Questions to Ask a Website Designer



4. What Should I Expect During Website Onboarding?

Not everybody needs or wants to know ‘how the sausage is made,’ so to speak, but knowing the general outline of the project’s steps is instrumental in choosing a veterinary website designer.

If you have a particular date that you need your new website to be ready by (or if you have yet to negotiate with your old website hosting provider), communicate this to the designer you’re interviewing to make sure that the expectations for delivery are what you need them to be.

You should leave with an estimate of your time commitment, length of time, and obstacles that would prevent the deadline to be reached. There should be a description of what is needed from the clinic and what iterations to the process look like.

Regardless of what sort of timeline a veterinary clinic website designer responds with, you want to make sure it meets your needs. If you have an existing website and need to give a minimum of 30 days’ notice before leaving your existing designer’s services, then knowing the timeline for the new website build will allow you to wait an appropriate amount of time before you cancel your existing one.



ARTICLE SUPPORTED BY: [VETCELERATOR](#)

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Questions to Ask a Website Designer



5. How Easy Is It to Transfer My Vet Clinic's Domain and Emails Without Losing Anything?

Transferring Your Website Domain:

Transferring a domain is a relatively easy process, but it's one that varies depending on your circumstances. To answer this question, a website designer will likely need to know through which registrar your domain was purchased, who currently has ownership of your domain, and (if it's another website designer) what their offboarding process is.

If you're not particularly tech savvy (or even if you are), you shouldn't have to do the work yourself. Commonly, prior providers put up roadblocks to transfer so it should be clear from this that a natural question to the new provider is "who owns the website, what is the cancellation process and offboarding process?" You'll want to hear that the website domain is yours to take - anything else is the wrong answer.

Transferring Your Emails:

Once again, this process is dependent on your specific circumstance. Where your emails are currently being hosted determines whether it's as simple as your new website designer gaining access to your existing account or if a more complex migration is required. Knowing who currently has admin access is another key piece of the equation. Regardless of the difficulty of the task, the veterinary website designer you're interviewing should offer to assist with transferring your emails.



ARTICLE SUPPORTED BY: [VETCELERATOR](#)

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Questions to Ask a Website Designer

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ARTICLE SUPPORTED BY: [VETCELERATOR](#)

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5 QUESTIONS TO ASK YOUR LENDING PARTNER

ARTICLE SUPPORTED BY: **BANK OF AMERICA**

INTRO

Securing the right financing can be one of the most pivotal steps in your journey to veterinary practice ownership. Whether you're dreaming of opening a practice, acquiring an existing clinic, or planning for future expansion, your lending partner will play a critical role in turning that vision into reality. But finding the right fit requires asking thoughtful questions that go beyond interest rates and loan terms. By understanding what makes you bankable, how lenders specialize within the veterinary space, and what additional value they bring to the table, you can set yourself up for long-term success.



TYPES OF VENDORS:

- BRANK OF AMERICA
- PROVIDE
- US BANK



ARTICLE SUPPORTED BY: **BANK OF AMERICA**

5

Questions to Ask Your Lending Partner



1 - What makes me bankable?

It is best to have a conversation with a lender early on to understand what they are looking for to approve you for financing. Whether that is 6 months, 1 year, or 5 years in advance, the earlier the better. Each bank has their own set of underwriting guidelines, but they typically focus on:

- **Credit worthiness**
- **Liquidity (cash reserves)**
- **Ability to repay (production capability)**

An early conversation will allow you to rectify any potential issues if you are falling short in any of these areas. This means fewer headaches and a more pleasant experience when it's time to secure funding.



2 - What type of veterinary lending do you specialize in?

There are banks that not only specialize in veterinary lending but also have specific niches that they focus on. You will find veterinary lenders that specialize in startups, practice acquisitions, ground-up construction, SBA vs. conventional, and so on. You will want to align with a lender whose strength and specialty match what you are looking to accomplish.



ARTICLE SUPPORTED BY: **BANK OF AMERICA**

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Questions to Ask Your Lending Partner



3 - Aside from banking, how else can you help me?

When entering practice ownership, there is a lot more involved than simply securing financing. Think about what starting a practice looks like. You will need:

- **Veterinary-specific realtor to locate, negotiate, and secure space**
- **Contractor and architect to design and build it**
- **Marketing company to a design website, build social media, and advertise**

And if you're purchasing a practice:

- **CPA to review practice financials**
- **Attorney to negotiate purchase agreements, employment contracts, etc.**

You will want to work with experts in these fields that also specialize in the veterinary industry, and your lender should be well-connected within that network to help make introductions. The most important thing you can do as a business owner is to surround yourself with experts.



ARTICLE SUPPORTED BY: **BANK OF AMERICA**

5

Questions to Ask Your Lending Partner



4 - What should I be thinking about when acquiring financing?

The term, rate, and amount of your loan are the first few items a borrower thinks about, and they are very important. You will also want to evaluate ancillary banking services that may be a condition of your financing agreement, such as a bank account, credit card, and merchant services. How much do they cost? Is the online banking platform easy to use, or do I need a branch nearby?

When evaluating your options, look at it through the lens of 'what am I trying to accomplish and what would I like my personal and professional life to look like?'

Are you looking to build an empire and own multiple practice locations? Or will this be your one and only to take you to retirement? Is your priority to pay down student loans, build a family, set aside savings for your children's college tuition, or buy a vacation home? These factors should be considered when selecting your financing because the terms of your loan can affect how quickly you can accomplish these goals.



ARTICLE SUPPORTED BY: **BANK OF AMERICA**

5

Questions to Ask Your Lending Partner



5 - I've started/acquired my 1st practice; what should I do next?

Your first 3-5 years of practice ownership should be focused on settling in as an owner and growing your practice responsibly. Identify your strengths, what your weaknesses are, and what you can improve. It is key to work with a veterinary-specific CPA that understands the industry and which metrics to look for. Maybe your wages are too high or low, or your COGS are off, etc. Taking this advice and using it to improve your practice is paramount to your success.

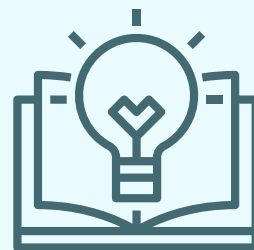
This will put you in the position to accomplish your goals, whether that's opening a 2nd office, purchasing a vacation home, or simply building your savings nest. Having a healthy and thriving first practice is a necessity to achieve the rest.

5 QUESTIONS TO ASK YOUR LEARNING AND DEVELOPMENT PROVIDER

ARTICLE SUPPORTED BY: **IGNITE**

INTRO

When a veterinary practice is evaluating adding a learning and development solution provider to upskill their team and improve retention, the right questions help separate vendors who offer surface-level programs from those who deliver measurable results.



TYPES OF VENDORS:

- VETFOLIO
- IGNITE
- ATDOVE



ARTICLE SUPPORTED BY: **IGNITE**

5

Questions to Ask Your L&D Provider



1 - How do you customize training content for different roles within a veterinary practice?

Veterinary teams are made up of veterinarians, technicians, client service staff, and managers, each with distinct training needs. A strong provider should demonstrate how they adapt content to different roles so that training isn't generic, but relevant and directly applicable.



2 - What measurable outcomes have your clients achieved through your program?

Metrics such as improved client satisfaction scores, higher treatment acceptance rates, reduced staff turnover, or increased efficiency show whether the vendor delivers more than just "training sessions." You want evidence that the solutions drive business and cultural impact inside practices. Ask about completion rates of their program to put a number to some of these outcomes.



ARTICLE SUPPORTED BY: **IGNITE**

5

Questions to Ask Your L&D Provider



3 - How is the content delivered, and how do you keep teams engaged long-term?

Veterinary teams are busy, and engagement drops if learning is passive. Vendors should explain their mix of live workshops, on-demand modules, peer forums, or coaching. Ask how they define engagement and what their rate of engagement has been for the specific programs you're interested in.



4 - How do you support managers and practice leaders in reinforcing learning?

Training fails without leadership buy-in. The best providers also give managers playbooks, dashboards, and coaching tools to reinforce behaviors on the floor. This creates accountability and cultural adoption, rather than a one-off event.



5 - What does your ongoing support model look like after implementation?

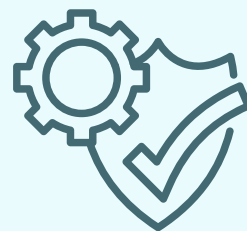
Learning isn't a one-time project. Veterinary practices should know if the vendor provides dedicated account managers, data dashboards, periodic check-ins, or refreshers. A clear support model indicates whether the vendor is invested in long-term success over just the initial sale.

5 QUESTIONS TO ASK YOUR EMPLOYEE BENEFIT INSURANCE BROKER

ARTICLE SUPPORTED BY: **ALERA GROUP**

INTRO

Managing a veterinary practice is tough enough without worrying if your employee benefits program is being handled the right way. The reality is: not all brokers are created equal. Asking the right questions will quickly reveal if your current partner is adding real value, or if it's time to explore an advisor who truly understands the veterinary world. Here are five questions every practice owner or manager should be asking.



TYPES OF VENDORS:

- ALERA GROUP
- HUB
- PAYROLL PROVIDERS
- PEOS



ARTICLE SUPPORTED BY: **ALERA GROUP**

5

Questions To Ask Your Insurance Broker

Q&A

1 – What benchmarks do you use to evaluate if our plan costs and contracts are competitive with other veterinary practices?

The right broker should bring industry-specific benchmarking, not just generic averages.

Q&A

2 – How do you help us align our benefits strategy with recruiting and retaining veterinarians, technicians, and support staff?

Benefits should be a tool to solve your #1 challenge: attracting and keeping talent.

Q&A

3 – What tools and resources do you provide to help our team administer benefits effectively?

A strong partner provides tech-enabled platforms, onboarding guides, and employee education materials.alent.



ARTICLE SUPPORTED BY: **ALERA GROUP**

5

Questions To Ask Your Insurance Broker

Q&A

4 – What proactive strategies do you bring to control costs beyond just shopping the market at renewal?

Look for creative funding options, alternative approaches to healthcare purchasing like direct primary care-based plans or HRAs, and data-driven cost containment.

Q&A

5 – How do you keep us compliant with regulations and protect us from penalties?

Veterinary practices don't have compliance officers. Your broker should fill that gap with clear guidance and resources.



ARTICLE SUPPORTED BY: **ALERA GROUP**

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ARTICLE SUPPORTED BY: **ALERA GROUP**

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ARTICLE SUPPORTED BY: **ALERA GROUP**

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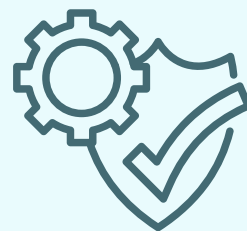
5 QUESTIONS TO ASK BEFORE CHOOSING A DEA COMPLIANCE SOLUTION

ARTICLE SUPPORTED BY: **VETSNAP**

INTRO

Managing controlled substances in a veterinary practice is no small task. The DEA expects accurate, timely, and secure records, and failing to meet those standards can lead to costly fines, lost licenses, or worse. Paper logbooks and ad hoc systems leave too much room for error, which is why many practices are turning to digital solutions.

But with so many options out there, how do you know which one is right for your team? Here are five critical questions to ask any vendor when evaluating a DEA compliance solution.



TYPES OF VENDORS:

- CUBEX
- VET S8
- MWI REPLENI-TRAC
- VETSNAP



ARTICLE SUPPORTED BY: **VETSNAP**

5

Questions to Ask a DEA Compliance Solution

01

DOES THIS SOLUTION ENSURE REAL-TIME, DEA-COMPLIANT RECORDKEEPING?

No matter how sleek the interface looks, if it doesn't check the DEA compliance box, it's not the right solution. Entries for controlled substances must be "complete and accurate" and "maintained on a current basis" (21 CFR §1304.21). That means logging right when a drug is administered or wasted, not at the end of the day. Ask how the software ensures timely, accurate entries and prevents backdating or missed logs.

02

HOW DOES IT HANDLE RECONCILIATION AND DISCREPANCY DETECTION?

Reconciliation shouldn't be a nightmare. The right tool should make it easy to match logs against invoices and PIMS records, flag discrepancies automatically, and help you resolve issues quickly. Ask whether the system supports daily or weekly reconciliation workflows and whether it provides audit-ready reports.



ARTICLE SUPPORTED BY: **VETSNAP**

5

Questions to Ask a DEA Compliance Solution

03

DOES IT SUPPORT TEAM-WIDE ACCOUNTABILITY AND TRAINING?

Compliance isn't safe if it only lives in one person's head. Look for a system that comes with clear SOP support, user-specific login credentials, and training resources so everyone (from relief vets to new techs) can log consistently and confidently.

04

WHAT ARE THE SECURITY PROTOCOLS?

A safe isn't secure if "everyone knows the code." Proper storage and access control are essential to preventing diversion. Ask how the solution helps you document who accessed what and when, and whether it integrates with secure hardware like smart safes or lockers for added peace of mind.

05

DO THEY OFFER SUPPORT AND REPORTING?

When it comes to compliance, you need a partner. Ask if the vendor provides responsive customer support, onboarding, and ongoing training. Also, check whether the system generates DEA-friendly reports, PMP submissions, and detailed audit trails so you're always inspection-ready.





